

Transition Skills Assessment Outcomes

Name

Social Security Number

Entry Assessment Completed By

Entry Assessment Date

1. Understand Learning Styles

Objective: The customer understands his/her individual learning style and how to adapt to others' learning styles to make the most of learning situations.

Criteria	Entry Assessment		Final Assessment	
	Yes	No	Yes	
• identified the main types of learning styles				
• identified his/her personal preferences and strategies for taking in new information				
• identified at least three strategies for adapting personal learning style to others' styles				
• identified strategies for creating options for others to best provide information to meet his/her own learning style				
• identified potential jobs or occupations where learning style and personal preference are put to best use				
All criteria for understanding learning styles have been met			Date	Initials

2. Create a Schedule to Meet Obligations

Objective: The customer can organize daily activities and create a schedule to meet personal and work-related obligations.

Criteria	Entry Assessment		Final Assessment	
	Yes	No	Yes	
• identified daily, weekly, or monthly activities including work, personal, family and training commitments				
• prioritized all activities required on a daily, weekly, or monthly basis				
• allocated the appropriate amount of time to each activity				
• produced a daily, weekly, and monthly schedule for managing time				
• has successfully managed time for at least two months by following schedule and making necessary adjustments				
All criteria for creating a schedule have been met			Date	Initials

3. Build Personal Skills

Objective: The customer understands how to continue to build personal skills and access education to advance on the job and/or to transition to a new career.

Criteria	Entry Assessment		Final Assessment	
	Yes	No	Yes	
• identified need for additional skills building and which training is needed to reach work-related goals				
• identified education and work experience which relates to chosen career interests				
• knew local options/institutions where training in career interests is available				
• understood basic requirements for enrolling into training including registration process, financial aid options, classes required for training completion, and how to develop class schedules				
• has developed an overall action plan for completion of training including current class agenda, amount of time to complete training, on-going strategy to pay for education				
All criteria for building personal skills for job advancement have been met			Date	Initials

4. Utilize a Variety of Transportation Strategies

Objective: The customer can get to work and personal appointments by utilizing a variety of transportation methods, identifying the best possible paths, and selecting the appropriate strategy to arrive on time.

Criteria	Entry Assessment		Final Assessment	
	Yes	No	Yes	
• identified up to three transportation sources				
• knew how to use computer technology to plan route when unsure of location or directions				
• estimated time needed for travel, traffic problems, or other possible delays to ensure on time arrival				
• prepared back up strategies for timely arrival at commitments that can be tapped into in case of an unexpected problem with travel arrangements				
• researched cost of, and options for, purchasing and maintaining a car				
• has successfully gotten to scheduled activities for at least 3 months				
All criteria for using a variety of transportation strategies have been met			Date	Initials

5. Manage Crisis Situations

Objective: The customer can anticipate and manage crisis situations and identify alternative solutions when established plans of action fail.

Criteria	Entry Assessment		Final Assessment	
	Yes	No	Yes	
• identified and explained at least three examples of crisis situations/problems that have occurred or could occur				
• identified the symptoms leading to or causes of the problem situation that will require immediate attention				
• created and considered at least three potential solutions to crisis situation				
• determined best possible solution to the problem and implemented a backup action plan				
• dealt with emotional aspects of crisis to avoid undue stress, handled situation in an emotionally healthy manner				
• managed at least three crisis situations successfully, achieving the desired outcome				
All criteria for managing crisis situations have been met			Date	Initials

6. Maintain Personal Documents

Objective: The customer can obtain and maintain personal documents including working papers, social security card, driver's license, birth certificate and pay stubs.

Criteria	Entry Assessment		Final Assessment	
	Yes	No	Yes	
• identified the types of personal documents that were important to have accessible				
• explained why each document was important				
• knew how/where to get needed documents if lost or stolen				
• established a way of organizing documents and where to store documents for easy access when needed				
• has all necessary documents readily accessible				
• produced needed documents on at least two occasions when called for (i.e., beginning a job, filing taxes, enrolling into training, applying for a loan)				
All criteria for maintaining personal documents have been met			Date	Initials

7. Enter into Contractual Agreements

Objective: The customer understands how to analyze the requirements and responsibilities of, and enter into, contractual agreements.

Criteria	Entry Assessment		Final Assessment	
	Yes	No	Yes	
• identified at least three types of contractual agreements that he/she has entered into or may be entering into				
• explained requirements and obligations of contract				
• understood terms and conditions of contractual agreements				
• knew how to negotiate terms and conditions of contracts (when negotiation is possible)				
• explained consequences (legal and financial) for not fulfilling obligations or breaking the contractual agreement				
• understood process to, and with whom to, re-negotiate terms and conditions				
• knew legal rights when contractor is not fulfilling or has broken the terms of the contract				
All criteria for entering into contractual agreements have been met			Date	Initials

8. Use Bank Accounts to Manage Income

Objective: The customer can open a bank account to manage income and pay bills.

Criteria	Entry Assessment		Final Assessment	
	Yes	No	Yes	
• identified all sources of income and expenses				
• identified at least three banking institutions in local area				
• compared different banks and their services and selected best option for his/her need including fees and minimum balance				
• opened a bank account				
• paid bills for at least 3 months using bank account without overdrawing account				
All criteria for using a bank account have been met			Date	Initials

9. Access Community Resources

Objective: The customer can access community resources to assist in overcoming potential barriers and avoid potential setbacks in progress toward success.

Criteria	Entry Assessment		Final Assessment	
	Yes	No	Yes	
<ul style="list-style-type: none"> identified at least three potential needs that have or may arise (car break down, legal matter, break up in personal relationship, job loss, no money for training) that would cause a set back 				
<ul style="list-style-type: none"> identified, or knew where to get information on, at least three local organizations or community resources where assistance was offered 				
<ul style="list-style-type: none"> understood process for accessing the needed services including eligibility, who to see, what documentation was needed, etc. 				
All criteria for accessing community resources have been met			Date	Initials

10. Establishing Independent Living Situation

Objective: The customer can establish an independent living situation by arranging for housing, turning on public utilities, and setting up living quarters.

Criteria	Entry Assessment		Final Assessment	
	Yes	No	Yes	
<ul style="list-style-type: none"> identified the items needed for moving out on own 				
<ul style="list-style-type: none"> identified initial costs associated with moving out on own including deposits, purchase of personal items, etc. 				
<ul style="list-style-type: none"> identified a monthly budget for living expenses including rent, utilities, food and other personal expenses 				
<ul style="list-style-type: none"> identified affordable housing options, including sharing expenses with a roommate 				
<ul style="list-style-type: none"> understood requirements of lease agreement and tenant's rights and responsibilities 				
<ul style="list-style-type: none"> prepared a monthly budget for meeting financial obligations 				
<ul style="list-style-type: none"> identified public utilities to be turned on and know where/how to get them connected 				
<ul style="list-style-type: none"> has lived on own for at least 3 months successfully 				
All criteria for establishing independent living have been met			Date	Initials